

Monday, August 4, 1986

Advertising Age

Crain's International Newspaper of Marketing. In Two Sections, Section 1.

By **ROBERT RAISSMAN**
and **LARRY G. COLLINS**

NEW YORK—The next two weeks could be the most critical in the history of tv sports, and the prognosis is unequivocally grim for the networks.

While in recent weeks most attention has centered on the U.S. Football League's antitrust suit against the National Football League, network tv sports was developing into the best buyer's mar-

Even Super Bowl will 'deal'

ket ever. Cost-per-thousand rates for NFL games will be at least 10% to 15% below last year, and the networks are offering unprecedented amounts of multidaypart deals to advertisers, thus bringing down the price of prime time.

CBS is offering discounts on Super Bowl XXI if advertisers will

take time in its September NFL games. If that won't do it, CBS will throw in college-basketball regular season and tournament games, and even its coveted National Basketball Assn. coverage—all at reduced prices—if advertisers will take pro and college football.

In order to move "Monday Night

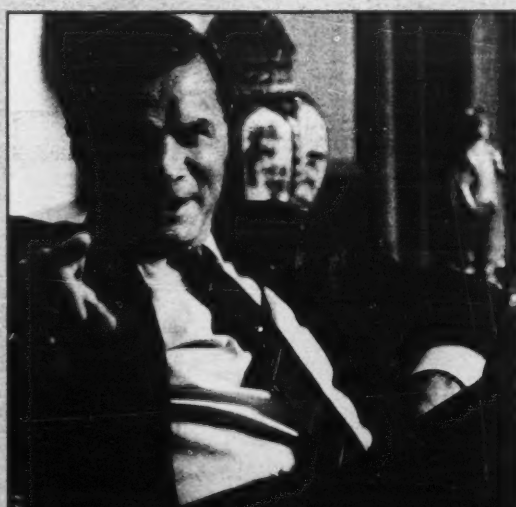
Football" in September, ABC is combining it with prime time and late night at 20% discounts. ABC also is offering "MNF" in combination with its Major League Baseball League Championship Series, with prices being cut drastically.

And NBC has sold its prime time programing at no price increase to

advertisers willing to pay rate card prices for its NFL games. NBC's 1986-87 straight prime time rates increased 5% to 7%.

Most of those sales strategies have never before been offered in network sports.

The networks, facing the fourth consecutive year of soft sports sales and feeling extreme pressure from their new parent companies, are trying to sell all sports inventory upfront, eliminating the sports (Continued on Page 64)



"There are 940 or 950 packages of cigarettes sold in this country every second of every day. If it declines to 936, that's fine."

—J. Robert Ave, president-ceo of Loews Corp.'s Lorillard unit.

Lotsa smoke, no fire

Ban tobacco ads? Marketers stay cool

By **WILLIAM F. GLOEDE**

There's a lot of smoke on Capitol Hill about banning tobacco advertising, but executives at the nation's largest tobacco companies are sitting back, lighting up and conducting business as usual.

They don't believe it'll happen.

And they're not in a panic over the fact that cigaret sales are sliding 1% to 2% per year, or over various moves to further curtail tobacco usage in the U.S.

"There are about 940 or 950 packages of cigarettes sold in this country every second of every day around the clock. If it declines to 936, that's fine. If it declines to 932, that's fine, too," says J. Robert Ave, president and ceo of Loews Corp.'s Lorillard unit,

the nation's fourth-largest cigaret maker.

Even though cigaret sales, by far the biggest sales segment in the tobacco industry, are sliding at the rate of between 1% and 2% per year, more than a quarter of all Americans use tobacco products. An estimated 50 million adults smoke cigarettes, and only six companies fill nearly all the demand.

"Cigarettes are a fantastic cash cow," says John C. Maxwell Jr., industry analyst for Furman Selz Dietz Mager & Birney, New York.

Mr. Maxwell proclaims the financial condition of the tobacco companies "fantastic," adding, "Philip Morris and Reynolds are throwing off almost \$2.5 billion in [uncommitted] cash this year." He (Continued on Page 66)

White House against ban on tobacco ads

By **STEVEN W. COLFORD**

WASHINGTON—Limiting anti-tobacco Surgeon General C. Everett Koop to an unofficial role, the White House threw its support to advertisers last week in the battle with a House subcommittee on proposed limits to tobacco advertising.

Representing the White House, deputy assistant attorney general Douglas Kmiec told the House health and environment subcommittee Friday the Reagan administration "is not convinced that cigaret advertising leads to increased consumption."

He also noted that tobacco ads "sup- (Continued on Page 8)

Puritan changes oil

Will tout lowest saturated fat level

By **JUDANN DAGNOLI**

Procter & Gamble, Cincinnati, today breaks an estimated \$10 million health-oriented national campaign for a reformulated Puritan oil now that the term canola oil has been approved for marketing in the U.S.

New Puritan, reformulated with low erucic acid rapeseed oil, also known as canola, will replace the 20% soybean-oil and 80% corn-oil blend in Puritan in supermarkets this month, according to Don Tassone, a P&G spokesman. The first canola oil to be sold here, new Puritan will contain the lowest level

of saturated fat on the market, he said.

Nabisco Brands, which markets Fleischmann's and Planter's oils, said there are no plans to introduce a canola-oil product here. It is not known whether rival Hunt-Wesson, Fullerton, Cal., will jump on the bandwagon if canola is successful.

The Grey Advertising campaign for new Puritan, which has 6% saturated fat, half of current Puritan's 12%, will continue to use Michael Learned, the Puritan spokeswoman, but will now stress even greater health benefits for the brand. One product claim notes (Continued on Page 65)

Last Minute News

BBDO quits Pillsbury cake, frosting accounts

NEW YORK—BBDO has resigned \$15 million in Pillsbury cake mix and frosting business that conflicted with the \$35 million General Mills Betty Crocker account handled by Omnicom sister agency Needham Harper Worldwide, Chicago. BBDO will keep another \$15 million in Pillsbury microwavable-products assignments. Pillsbury says it is compiling a list of agencies with which to discuss the baked-goods account.

M&M shakes up creative department

NEW YORK—McCaffrey & McCall has reorganized leadership in its creative department. "In the wake of the ABC problem, quite a lot has been going on," said David McCall, chairman-creative director, referring to the loss of the \$25 million ABC Entertainment account (AA, July 21) and the departure of three of five execs listed as co-creative directors under Mr. McCall. Senior vp Stephen Klausner has been promoted to copy chief, succeeding exec vp William Shaw, who has left, while senior vp Thomas Yohe has departed and exec vp John Sidebotham Jr. has retired, says Mr. McCall.

Big Mac moves to Burnett overseas

LONDON—McDonald's Corp. is moving its pan-European account for satellite tv advertising to Leo Burnett Co., in London and Frankfurt, from Heye Needham & Partner, Munich. The account is described as small and (Continued on Page 8)

WASHINGTON
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CONGRESSIONAL INFO SERVICE
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HIGHLIGHTS

Weak sports market shakes networks 1

The next two weeks could be the most critical in the history of tv sports, and the prognosis is grim for the networks. While most attention has centered on the USFL's suit against the NFL, network tv sports was developing into the best buyer's market ever.

P&G makes Puritan healthier 1

Procter & Gamble today breaks an estimated \$10 million health-oriented national campaign for a reformulated Puritan oil now that the term canola oil has been approved for U.S. marketing.

Research split could hurt papers' ad sales 4

Newspaper-industry executives said the split between Simmons Market Research Bureau and Scarborough Research Corp. will make it tougher to sell national ads.

IRI heightens scanning competition 6

Competition for market share among research companies tracking market share intensified last week as Information Resources Inc. announced its InfoScan package-goods scanning service.

GM planning to slim down 10

General Motors Corp. plans to slash 39 models from its car lineup by 1992 to concentrate on each division's core models.

Agencies may fight for Army 15

By ordering a 10% cut in next year's Army advertising budget, the Pentagon finally may succeed in generating agency competition for an account still expected to rank among the biggest in U.S. advertising.

Outlook good for nonprescription drugs 26

The nonprescription-drug industry is expected to experience steady growth during the next several years, fueled by acquisitions, the switch from prescription to nonprescription status for some drugs and the emergence of new applications for existing drugs.

Fattal lands a big one 59

Fattal & Collins, a small Santa Monica creative boutique founded four years ago, is moving under a national spotlight now that it's been named to share the \$25 million ABC Entertainment account with Grey Entertainment & Media.

Flanagan faces tough tasks 61

As the new chairman of the American Advertising Federation, Wall Street Journal vp-marketing Bernard Flanagan will have to serve as the point man representing the "grass roots" of the advertising business at a time when it is under fire in several areas.

CATEGORY REVIEW

Software marketers square off 22

Computer software marketers are joining makers of personal computers in a scramble toward lower prices. The result is new, stiff competition at the low end of the software market.

INTERNATIONAL

Foreign ad spending on the rise 42

Foreign advertising expenditures are soaring higher than anyone predicted at the beginning of the year, due to new private tv channels in Europe. At the same time, surging inflation is sending the ad industries in Latin America and South Africa into a tailspin, but not enough to offset advances in Europe. An ADVERTISING AGE roundup.

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OTHER NEWS

Maxicare Health Plans' acquisition of HealthAmerica Corp. may be a shot in the arm for Chiat/Day. Page 10.

Sara Lee Corp.'s Peck Meat Packing unit, exploring what would be Sara Lee's first entry into retail deli products, created a new \$5 million advertising budget and assigned it to Cramer-Krasselt. Page 12.

Dow Chemical's Ziploc plastic bag still has the lock on the interlocking plastic bag market, but it may be facing its heftiest challenge this year from rival Glad plastic bags. Page 26.

Eastern Air Lines next month will attempt to clip Pan American World Airways' wings with a multi-million-dollar campaign supporting the first major service improvements on its shuttles in 25 years. Page 28.

The House of Seagram, the spirits marketing arm of Jos. E. Seagram & Sons, has shifted marketing responsibilities for some of its largest brands. Page 60.

Ron Kaatz says it's because this is such an exciting time in media and media research that he is looking forward to phasing out his involvement in the agency business. In September he will leave his post as senior vp-U.S. director of media concepts at J. Walter Thompson USA to become a parttime professor at Northwestern University's Medill School of Journalism. Page 61.

CAMPAIGNS BREAKING

Burger King Corp., Miami, this week begins a four-week promotion tying its children's meals to Lorimar-Telepicture's ThunderCats characters. Tv and point-of-purchase, via J. Walter Thompson USA, New York, supports (AA, June 30). (See related story on Page 53.)

SPECIAL REPORT

As the going gets tough, tough radio stations are seeking new personalities, promoting community events and turning to state-of-the-art marketing, including geodemographic and psychographic research. Special Report examines how radio stations are using these tools in response to competition.

Fox signs up 79 affiliates for fourth net

By WAYNE WALLEY

LOS ANGELES—Fox Broadcasting Co. said last week it will start its fledgling tv network this fall with at least 79 independent tv stations as affiliates.

The affiliates, which have signed two-year agreements starting with the October premiere of "The Late Show starring Joan Rivers" and including FBC's limited prime time offerings in March, cover nearly 80% of the country.

Together with its six owned tv stations, which it acquired from Metromedia, Fox said it will have outlets in all of the top 20 tv markets. That includes Boston, where Fox said it expects to select an affiliate soon from among a number of interested independents.

This surprising support from group and independent station

owners lends more credibility to Rupert Murdoch and 20th Century Fox chairman-ceo Barry Diller in their attempt to create a programming service to compete with the Big 3 networks.

When FBC outlined its plans for a fourth network earlier this year (AA, May 5), most observers expected Fox to attract only the lowest-rated independent stations. But David Johnson, FBC's senior vp-marketing, and David Hilton, vp-affiliate relations, said each of FBC's affiliates is "the best independent station available in each market."

In many markets, such as Detroit and San Francisco-Oakland, Fox snared the top rated independent station. In others, such as Seattle, it signed the second ranked indy in a market with four inde-

(Continued on Page 64)



Spuds sells suds for Bud

Spuds Mackenzie, the "Original Party Animal," makes his tv debut for Anheuser-Busch's Bud Light brand. The 3-year-old English Bull Terrier, a college campus cult figure (AA, March 6), is featured in three 30-second spots being tested in Los Angeles and San Diego. Needham Harper Worldwide, Chicago, handles.

West Coast news

Cal. lottery may sanction shops

California State Lottery, Sacramento, is considering a provision that would bar agencies with ties to South Africa from pitching the \$22 million-to-\$24 million account, sources said. An aide to Assemblywoman Maxine Waters confirmed that the assemblywoman has suggested the commission prohibit agencies with South African offices from taking part in the review. The commission will solicit an opinion from Gov. George Deukmejian, who recently called

for South African divestment in his gubernatorial campaign. "The governor and the commission have to be very sensitive on this issue," one source said. Such a provision could exclude several international agencies that have expressed an interest in the business, including Foote, Cone & Belding, JWT/West, McCann-Erickson and Young & Rubicam. Incumbent Rubin, Postaer & Associates, Los Angeles, wouldn't be affected. The (Continued on Page 66)



IRI adds package-goods scanning service

By SCOTT HUME

CHICAGO—Competition for market share among research companies tracking market share intensified last week as Information Resources Inc. announced its InfoScan package-goods scanning service (AA, July 28).

Basically a nationwide extension of its BehaviorScan service, widely used to track product test-marketing, InfoScan will track consumer purchasing of every product carrying a Universal Product Code in stores across the country as well as promotional activities (newspaper feature advertising, couponing, in-store merchandising and price reductions).

The data are correlated with individual purchasing patterns for

60,000 households and metered television habits for 10,000 households.

As a result, said IRI president Gian Fulgoni, InfoScan provides information not only on what is being purchased, but also on who is doing the purchasing and on the advertising and promotions to which buyers have been exposed. That, he said, puts IRI ahead of rivals such as Dun & Bradstreet's A.C. Nielsen Co. and Time Inc.'s Selling Areas-Marketing Inc., which track product movement alone. Mr. Fulgoni said the market-tracking business which IRI is entering with InfoScan is a \$300 million category.

Northbrook, Ill.-based A.C. Nielsen Co., which previously tracked product movement only through

twice-monthly retailer audits, last year introduced its own UPC scanner-based tracking service called ScanTrack Plus. Mr. Fulgoni said that "when the patriarch [Nielsen] blessed scanners," IRI took it as an indication that its research method was "a breakthrough product" and that it was time to expand its BehaviorScan technology beyond the eight markets in which it has operated if IRI were to maintain its lead.

BehaviorScan accounts for 85% of the electronic test-marketing business, he said.

Initially, InfoScan will cover 820 stores in 31 markets, including 20 major metropolitan markets. By July, 1987, data will be collected in 1,300 stores in 41 markets, and in 2,080 stores in 53 markets by the

end of 1987.

One sign of what Mr. Fulgoni said was strong and immediate interest in InfoScan from major marketers was the commitment of Cincinnati-based Procter & Gamble to be a charter subscriber. P&G is IRI's largest client, accounting for approximately \$10 million of the

research company's 1985 revenues of \$75 million. Other charter subscribers include Cadbury Schweppes, Campbell Soup Co., Chesebrough-Pond's, Del Monte Corp., Dial Corp., General Foods, General Mills, Miles Labs, PepsiCo, RJR Nabisco, Scott Paper Co. and Richardson-Vicks.#

AA to include monthly creative insert in N.Y.

NEW YORK—New York Creativity, a publication serving the creative community here, will be introduced to this market as part of Ad-

VERTISING AGE's Sept. 8 issue.

Billed as "The newspaper of the creative process," New York Creativity, or N.Y.C., will thereafter appear as a pullout section in copies of AA circulated in the New York City area every first Monday of the month. N.Y.C. will carry features and interviews with agency creatives, producers, commercial production house directors and editors, animators, creators of special effects, commercial music composers, musicians and producers, photographers and craftsmen engaged in printing and graphics design.

"Creativity is the heart of advertising and the process deserves the attention N.Y.C. will provide," said Rance Crain, president, Crain Communications Inc., and AA editor-in-chief. Louis De Marco, AA vp-publisher, announced that Charles Gabrielson and James P. Forkan will head the new venture as marketing director and editor, respectively. Mr. Forkan, AA senior editor-administration, has specialized in coverage of the tv and commercial music fields.

Mr. Gabrielson, who joined AA last year as marketing sales director, will have over-all responsibility for marketing and operating N.Y.C. He previously held advertising manager roles at Gannett Westchester-Rockland Newspapers and R.H. Macy's Bamberger's division. "N.Y.C. will be the first publication of its kind to bring together under one roof all the creative specialties—from concept to design to production," he said. Mr. Forkan, who will continue to write for AA, noted the new monthly will focus on "the unsung heroes of the creative process."#

LaSalle Group moves

St. Louis—LaSalle Group has moved to Centre 40 Bldg., 1600 South Brentwood Blvd.

CORRECTIONS & CLARIFICATIONS

• Peter McSpadden's title was listed incorrectly in a story about DFS Dorland's assignment to handle the Northwest Orient Airlines account (AA, July 28, P. 12). He is president of the New York-based agency.

• Us submitted incorrect year-to-date figures for the June Consumer Magazine Ad Linage chart (AA, July 21, P. 68). Correct numbers should read: January-June, 1986—262.5; January-June, 1985—157.8.

• CBS/Broadcast Group president Gene Jankowski points out that he has mentioned—but not acted upon—the possible addition of a 30-second spot over a three-hour prime time period as a revenue-boosting move. He has not mentioned adding 30 seconds per each prime time series episode, as stated in a disapproving editorial on the subject (AA, July 28, P. 17).#

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Viewpoint: Forum

Luring the young to Mad Ave.

By Lisa Rae Gossels

How can ad agencies continue to attract the caliber of young applicant so vital to our future? What do we have to offer entry-level talent, and how can we keep and motivate them?

I recently talked with career counselors at some 10 graduate and undergraduate universities, and spoke with recruiters at some 10 Manhattan ad agencies. Finally, I concentrated on the young people in our industry—80 of them, under the age of 30, by questionnaire.

Now before we can attract good, new talent to our industry, we've got to know where our competition is. I learned that very quickly by talking with some college career counselors. One counselor from a major university told me that 10 years ago about 5% to 7% of Columbia Business School's graduating class went on to careers in advertising. Now the number is at 2% to 3%. As he put it, "Advertising lags other fields in compensation. Students are also faced with a greater variety of career opportunities in marketing—the most prevalent being financial marketing." Madison Avenue no longer seems to have the monopoly on creativity. Nowadays on Wall Street, creative minds are a commodity.

What motivated our sample of people under 30 to give the

Ms. Gossels is a senior media planner at USAAdvertising, New York. This is excerpted from her recent speech to a session of the World Congress of the International Assn. of Advertising in Chicago.

Young people's expectations of their advertising jobs

*** indicates expectations were met

** met somewhat

* poorly met

Numbers represent percentage of 80 respondents

Creative	79%	★
Exciting	77	★★
Creative exposure	68	★
O-T-J training	63	★★
Self-expression	60	★
Range of businesses	57	★★★
Young	47	★★★
Good salary	41	★
Specific training	40	★
General training	40	★★
Glamorous	31	★
Step to brand mgmt.	21	★★
Step to sales	15	★★

ad biz a try? Here is a list of their expectations (above), ranked from high to low. Seventy-nine per cent of the respondents chose advertising because it was creative, and 15% chose it as a possible step to a sales job. These numbers tell us, in broad terms, that they see advertising as creative, exciting

and fast-paced. It also offers the possibility for broad creative exposure.

On the other hand, only 41% of the respondents had high salary expectations going in—and 60% did not choose advertising based on its specific or general training programs. This tells me that our industry has a reputation among young people for underpaying and undertraining its employees.

Which expectations of young people are being met? Well—advertising is young, as expected. And in terms of initial perception, advertising gave young people the opportunity to work on the expected range of businesses.

But what of expectations met somewhat? It is in this group that we begin to see some discrepancies. Advertising, initially perceived as exciting, proves in reality to be somewhat less than exciting.

Okay—we can live with that.

But what about on-the-job and general training? Now these motivations weren't initially high, so if the expectations are met somewhat, this means that young people may be getting less training than they had hoped.

Once at the top of the career expectation list, creative ranks near the bottom in terms of industry realities. If young people's desires for creative exposure and self-expression are also not being met, how can we maintain their interest and enthusiasm?

What about young people's salary expectations? If they were low the first go around, they are even lower now.

This being the case, how can we expect to hold on to our
(Continued on Page 22)

'Can do' vs. 'Can't fail'

By Charles G. Burck

The Challenger space shuttle catastrophe continues to yield lessons for managers everywhere. Prominent among these are that top executives cannot afford to be isolated from the people below, who are in better touch with what is going on, and cannot afford to set unrealistic goals.

Yet not even this conclusion goes to the heart of the trouble at NASA. The flaw—call it an institutional virtue gone wrong—can trip many companies with overweening ambitions. In its widely hailed report on the tragedy, the commission headed by former Secretary of State William P. Rogers criticized "NASA's legendary 'can do' attitude." The agency, Mr. Rogers and his colleagues admonished, can't do everything.

Sen. John Glenn went further. The can-do spirit, he noted, worked perfectly well in the old days, when it included a powerful commitment to safety. In Sen. Glenn's view, "can do" gave way over the years to "an arrogant 'can't fail' attitude." Managers assumed that no matter

what risks they took, the shuttle would succeed.

"Can't fail" arrogance is common enough in corporations that have long been on a roll. For years Detroit routinely launched badly built cars because the auto manufacturers had always been able to sell whatever they made. By the time they realized that consumers were rebelling, well-crafted Japanese cars had captured a commanding share of the market.

Sometimes "can't fail" reflects desperation. All too often the new venture is so important to the corporate future that it must succeed. Evidence to the contrary is not received with pleasure by top management. Nor are the courageous people who dare present that evidence. NASA suffered from this dangerous imperative, having made unrealistic promises in order to win congressional support.

Good internal communications will not help if top management does not want to hear about impending disaster. For the people down in the organization, survival dictates a blind eye.

Setting realistic goals is not good enough either. Most of

the great technological breakthroughs were "unrealistic" ideas made by determined, creative people. A company whose goals are invariably realistic soon sinks into lassitude: The range of undertakings viewed as realistic gradually narrows, and managers become risk-averse caretakers of corporate assets.

It would be easy to draw the wrong lesson from the Challenger tragedy by failing to distinguish between can-do and can't-fail. A dynamic organization has to take risks, and without a can-do spirit, it can't do much. That means that top executives have to know how to set "unrealistic" goals that work, and how to motivate people to go after them with fire in their bellies rather than fear in their bowels. The company has to be strong enough to absorb the cost of failure—and smart enough to listen when the people who know what is happening reach the limits of the can-do spirit. #

Mr. Burck is on the board of editors of Fortune, where this article first appeared. Copyright, 1986, by Time Inc. All rights reserved.

Welcome to Nightsoil Radio

By Bill Earls

Good morning, boys and girls. This is Sleazy Sam Sludge on Nightsoil Radio—the radio program that asks the burning question: "Who else is that on my pillow?"

This is the radio station your mother doesn't want you to listen to.

This is the radio station your teachers hate.

To hell with those people—what do they know, right?

On with the show. Tell you what. Lean over, slap your sleeping partner on the fanny and say, "Wake up, you lazy bum."

You don't have a sleeping partner?

Shame on you. You must be ugghhh-lee.

Here's our favorite song for the morning, "Like a Virgin."

We hope there's nobody like that out there, don't we?

Stamp out virgins. That's our motto.

Hey, you got one of them freaky teachers wants you to learn algebra and all that other junk? Tell you how to fix him. Get your girlfriend to wear something low cut, see—and

Mr. Earls, an author and free-lance writer, lives—and listens—in Middlefield, Conn.

when he's trying to look down her dress, you fill his pockets with glue.

Okay, it's call-in time again. You have five minutes to call in to SCUZ Radio—and tell me your favorite thing to do with whipped cream. Give me a break, though—don't even mention strawberry shortcake.

I hope you're going out to buy my latest book—"The 1,000 Dirtiest Things I Ever Said on the Air." It's in all the bookstores and it's crowding out Shakespeare, Dylan Thomas and all that other dumb stuff. This is good writing—things I said right on the radio. And got away with.

Remember the motto of Radio Sleaze—"If it ain't dirty, it ain't fun."

Hang on a sec while we play the theme music from "Porky's" for all you film buffs out there.

Hey, we got a winner in the whipped cream contest. It's Susie Gondawanda—and I can't even tell you what she said. Susie wins a Prince album, a mirror for her bedroom ceiling and tickets to whatever R-rated movie she can sneak into. Susie's a freshman at Central High in Goobertown, by the way.

And, hey, fellas—she carries her own whipped cream.

Oh, just a minute—it's Lord's Prayer time on Reverend Radio. The Supreme Court says that you can't have prayers

in school—bunch of pinko old men. We'll show them. Let's all say the Lord's Prayer together right now—and see if they shut us down for that.

Thank God for the First Amendment.

Here's a letter from Wilbur Flunge of Wibbleville. He was just suspended from school for smoking in geometry class and thinks that if we call his principal, Nasty Norman, maybe he can get back in school.

"It was just a little cigaret," Wilbur writes. "I don't think I should have to stay home and not see the cafeteria food fight."

We agree, Wilbur, and you get the Amnesty Award from Sleazy Sam.

Okay, lovers of truth and justice, call Wibbleville High School and tell Nasty Norman that if he don't let Wilbur back in school, you'll slash his tires. And maybe his suit—with him in it.

Here's a request. You say your name is Mary? When was the first time you made love with the milkman, Mary? You don't have a milkman? So what? You're 11 years old—you should find a milkman, then.

Okay, just because you promised to find a milkman, here's the song you requested, Mary, "You Make Me Feel Like a
(Continued on Page 22)

CATEGORY REVIEW: SOFTWARE

Low-price software flooding pc market

Sale increases expected this year

By CLEVELAND HORTON

Computer software marketers are joining makers of personal computers in a scramble toward lower prices. The result is new, sometimes stiff, competition at the low end of the software market.

The competitive climate also is drawing new attention to the challenge of marketing software, as manufacturers seek the appropriate price to spur sales, fight for shelf space and wrestle with the need of consumers for "hand-holding" after they make a purchase.

Even companies with highly successful, high-price products, such as Ashton-Tate with its dBase data management system, are jumping into the cut-price commodity sector of the market with stripped-down or simplified versions of their breadwinners.

Today, a full-feature pc software program for word processing, accounting, database management and other business tasks is as likely to carry a \$69.95 price tag as the more traditional \$695.

"Everyone is trying to get into the low end of the market," says Jan Lewis, president of Palo Alto (Cal.) Research Group, a high-tech market research company.

The growing number of cheap computers arriving from Taiwan, Korea and other Far Eastern countries is forcing individual and corporate computer purchasers to look at software in a new way. If a company spends \$600 for a machine that duplicates the functions of IBM's \$2,895 PC XT computer,

would it spend \$695 for Ashton-Tate's best-selling dBase III-Plus?

Total sales of software to the "workplace" market will hit \$4.7 billion this year, up from \$3.8 billion last year and \$2.7 billion in 1984, according to Future Computing, a Richardson, Tex.-based market research company. Despite the high-price market leaders, Future Computing estimates 60% of software packages, by unit sales, are priced at \$200 or less.

Established market leaders such as Ashton-Tate and Lotus Development Corp. continue to dominate their segments of the software market with relatively high-price products. But newcomers often try to elbow in through the low end of the market.

"The fact that Ashton-Tate and Lotus are able to survive at that high price point is very rare in the industry," said Ms. Lewis.

For Lotus, the company's early success with its multifunctional 1-2-3 spreadsheet, assisted by an extravagant \$2 million introductory ad budget, made the program a "must-buy" for companies. Hill, Holliday, Connors, Cosmopolis, Boston, handles, although Lotus now is not promoting 1-2-3.

Exploiting its position as a safe and proven standard for business, Lotus is able to fend off the low-price look-alikes from less established competitors such as Paperback Software, a Berkeley-based

publisher founded by computer industry maverick Adam Osborne. Paperback Software promotes its VP-Planner as a "keystroke for keystroke" replica of 1-2-3, with several additional features. Its VP-Planner carries a \$99.95 suggested price tag, compared with 1-2-3's hefty \$495.

Sales of VP-Planner hardly bolted out of the gate at its introduction last October, but recently have picked up. Paperback Software, which markets other software packages as well, recorded total sales of just more than \$1 million last year, and a loss of \$810,000. For the first quarter of this year, the company broke even on total revenues of \$650,000, mostly derived from VP-Planner. By contrast, Lotus sold 630,000 copies of 1-2-3.

Paperback Software and VP-Planner are pitted against Mosaic Software, Cambridge, Mass., which markets another 1-2-3 look-alike named Twin. Mosaic originally priced its entry at \$149 but recently cut the price to \$99, breaking what some observers believe is the psychological sticking point for software customers.

The company says it has sold about 30,000 copies of Twin, using limited, in-house advertising.

Paperback Software takes a more aggressive approach to promotion. The company's ads, prepared in-house, appear frequently in the computer magazines and always include an order form.

Dallas, Tex.-based Dac Software in just 13 months succeeded in selling 130,000 copies of Dac-Easy Accounting, a \$69.95 package competing primarily against companies charging considerably more for their accounting packages. For example, Chang Laboratories, San Jose, Cal., one of the top five ac-

counting software program publishers, charges \$500 for a package that provides fewer functions than Dac's software.

Like Paperback Software, Dac also includes order forms in its print ads. Formerly at Ogilvy & Mather, Houston, the account is now handled in-house.

MicroPro International recently

versify into other types of software, MicroPro decided to concentrate on its former strength. In October, 1984, MicroPro released WordStar 2000, priced above the original WordStar program. In May, 1985, the company introduced Easy, an easy-to-learn word processor with some but not all of the features and speed of WordStar, at a quarter of the price.

Priced at \$99, Easy is both MicroPro's loss leader and entry-level product. It is designed for infre-

"Can 1-2-3 help my business?"

Features include: 1. Easy to learn and use. 2. Powerful formulas and functions. 3. Flexible layout and printing options. 4. Integration with other software. 5. Comprehensive support and training resources.

Dac-Easy Accounting "Best Software Value"

Trendsetting Accounting Product of the Year! 100,000+ copies sold. Price: \$69.95. Features: Easy to learn, powerful formulas, flexible layout, integration with other software.

Lotus Development Corp.'s 1-2-3 spreadsheet software continues to dominate its segment of the market with a relatively high-price product. But newcomer Dac Software has elbowed in at the low end of the electronic spreadsheet market.

"discovered" low-price software. The San Rafael-based company once dominated the word-processing market with WordStar, one of the first full-feature writing programs. Since its introduction in 1978, MicroPro has sold more than 2 million copies of WordStar.

Lower-price word processors such as PFS:Write, and easier-to-use programs such as MicroSoft's Word, knocked WordStar off the best-seller lists several years ago and MicroPro never fully recovered. After an abortive effort to di-

quant writers, although MicroPro assumes some Easy customers will graduate to its WordStar programs.

While MicroPro created completely new software for the low-price category, other software publishers will strip features from a successful (and usually more expensive) program and market it at drastically lower prices.

WordPerfect, Orem, Utah, ranked sixth among word-processor publishers last year with its \$495 program of the same name. (Continued on Page 24)

Nightsoil

(Continued from Page 18)
Natural Woman."

Here's the Money-Saving Tip of the Week from the Grabbit brothers of Cliptown. They say to go into a supermarket, buy some of that cheap French bread and, while you're walking around, fold a couple of expensive sausages into the bread and then close the bag up. Cheap eating, they say. Thanks, guys. Don't come to my store.

Tell you what, it's getting pretty quiet here. While we play something gentle from Twisted Sister, why don't you call in and tell me the funniest thing you ever said while making love. No fair calling in if you're over 16—we don't want to tie up the phone lines.

Speaking of phones. The Weekly

Take Care of Yourself Award goes to Reginald Snibblefirsch, who took a job as night janitor—just to call his senior class in Hong Kong from work. Good trick, Reggie.

Song time. Let's all sing together the theme song of Scuzbucket Radio:

"We're a bunch of sleazes/We say what we please/You can try to stop us/But no one can ever top us."

"We wallow in sex and slime/We do it all the time/We tell lots of bathroom jokes/Insult lots of folks/Fill the air with 'damns' and 'hells'/'Cause what we're doing sells."

Hey, we gotta break for the news—find out what Rotten Ronnie and Barbie are doing with our tax money. We'll be back in six minutes with more slime and grime on Sleazeball Radio.

Awright!

Mad. Ave.

(Continued from Page 18)

good people without paying them more? What can we do to attract good entry-level people?

1. **FIND THEM.** Let them know we exist. That means recruiting on more college campuses—not only for account executive positions, but media and creative as well.

2. **SELL OURSELVES BETTER.**

Let young people know we offer a variety of career opportunities.

3. **PAY THEM BETTER.** If we want to attract the best young talent, we must offer competitive starting salaries. I suggest lowering the second and third pay increments to offset the initial loss.

4. **TRAIN THEM.** In all areas. General and specific. And where we don't have the manpower or resources, we should let applicants know we will finance some of their

outside education.

But beyond that, what can be done to keep them in tow?

Keep them involved. Make them feel part of a greater whole.

If you make young people feel part of your company, they'll be less likely to leave.

If we want to compete for and hold on to the good people out there, we, the great communicators, must learn to communicate better—and share. #

Advertising Age

Crain's International Newspaper of Marketing

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Cigar sales still slumping

By JOHN C. MAXWELL JR.

In 1985, the cigar industry continued its downward sales trend, a decline that has been continuing for more than two decades. In units, the large category fell 7.7%, small cigars were down 16% and little cigars were down 1.2%. Overall, the market share for the three types of cigars stayed pretty much stable.

On a dollar basis, sales also fell pretty much across the board. However, premium-price cigars continued to move up; a recent study shows that 53% of the CEOs in the Fortune 500 companies smoke

cigars.

Swisher continued its No. 1 position, but lost some share. Most of the other major companies maintained or increased share.

Again in the little-cigar category, Dutch Treats seems to be the only product to show some share increase.

About the only new products out there come from Swisher—Swisher Sweet Wood Tipped and the King Edward Wood Tipped products in regional markets.

Also, King Edward has a slim in test market.

Simmons Research data shows the younger generation (18 to 34)

appears to be picking up as a cigar-smoking segment, while the older generation cigar smokers (over 65) seem to be the biggest consumer of all.

In the case of little cigars and cigarillos, again this appears to be concentrated in the young age bracket and over-65 in the high-income bracket.

A study by Mediarnk Research shows that about 7% of the population smokes cigars, and college graduates appear to be the heavier smokers. #

Mr. Maxwell is with Furman Selz Mager Dietz & Birney, New York.

Glad adds color to lock bags

By LISA E. PHILLIPS

Dow Chemical's Ziploc plastic bag still has the lock on the interlocking plastic bag market, but it may be facing its toughest challenge this year from rival Glad plastic bags, now marketed by First Brands Corp., Danbury, Conn., which just purchased the business from Union Carbide.

Glad Lock bags, featuring a unique color-changing seal, broke a network tv campaign in early July following the final phase of its yearlong national expansion. The third in a series of 30-second tv commercials for the brand, titled "Kindergarten," via Leo Burnett USA, Chicago, broke July 21.

The ads, each featuring at least one child, stress the color-change feature of Glad's seal, comprising a blue line of adhesive on one side and a yellow line on the other. When pressed together, the adhesive turns green and "you know your bag is sealed," according to Glad's tv spot spokesman, actor Tom Bosley.

"Kids love it. It's fun and it gets across that we're the only bag with

a color-changing seal," said Jeff Schnell, Glad Lock product manager at First Brands.

Mr. Schnell declined to disclose spending on the Glad Lock campaign, which will run for at least a year, he said. No other new creative is expected.

The product line changed hands with the completion of the purchase of the business by former Union Carbide executives, who formed First Brands. Danbury-based Union Carbide put the product line on the selling block last year as part of a successful defense against GAF Corp.'s takeover attempt.

Eveready and Energizer batteries were bought by Ralston Purina Co., and First Brands also bought the Simoniz, Prestone and STP automotive-product lines.

Ziploc, with a 65% share of the interlocking plastic bag market, last year had measured spending of \$18 million for its food storage, freezer, microwave and sandwich bag lines, according to Leading National Advertisers.

Glad Lock illustrates the benefits of its bags in advertising by

showing kids having an unfortunate accident with competitors' bags, such as strawberry jam leaking out of a bag.

While zip-closures have "made a significant impact" in the food storage bag market, said Mobil Oil spokesman Jim Amana, Mobil's Baggies brand twist-tie plastic bags are still the over-all market leader, with 35% of the market. Ziploc accounts for 20% of the over-all food storage bag market, and Glad trails with 18%, he said.

The company is satisfied with the performance of its twist-tie bag and has no plans to introduce its own interlocking system, Mr. Amana said.

Mobil's Baggies and Hefty brand storage bags were backed by \$2.7 million in measured ad spending last year, via Ted Bates Advertising/New York.

Glad spent only \$3.4 million in measured media to support its food storage, freezer and sandwich bags. The majority of the total \$18.2 million measured spending for Glad last year backed its other plastic products, such as trash and garbage bags and microwave food wrap. #

Drug outlook bright: Kline

Nonprescription proliferation will continue

FAIRFIELD, N.J.—The nonprescription-drug industry will continue to experience steady growth during the next several years, fueled by acquisitions, the switch from prescription to nonprescription status for some drugs and the emergence of new applications for existing drugs.

That analysis, from Charles H. Kline & Co., here, is based both on this year's growth in the over-the-counter market and on some of the changes that have taken place recently in the drug industry.

Sales of nonprescription drugs are forecast to increase 7% this year, compared with last year's 5.9% increase.

The survey predicts otc growth will continue.

According to the Kline survey, the increasing popularity of cross-over products, medications that can be used for more than one condition, has had a tremendous impact on the drug industry.

One such cross-over product is fiber, which is now being used as a diet aid and a laxative.

Sales of diet aids such as Schering-Plough's Fibre-Trim and laxatives such as Merrell-Dow's Citrucel were helped substantially by consumer interest in fiber, the survey showed.

Additionally, calcium helped revive the antacid category in 1985, with Norclith-Thayer's Tums post-

ing a sales increase of 34%.

Calcium also created a new category of otc, calcium supplements, which Kline estimates will post 8% unit growth annually through 1990.

The increasing popularity of cross-over products, medications that can be used for more than one condition, has had a tremendous impact on the drug industry.

Another contributor to Kline's favorable prediction is the increase in sales for major drug companies after mergers and acquisitions. According to the study, Procter & Gamble's otc business increased 350% in 1985, following its acquisitions of Richardson-Vicks and Searle Consumer Products. P&G now ranks fifth among nonprescription-drug companies.

Kline also predicts that increased promotion of Warner-Lambert's Benadryl and A.H. Robins' Dimetapp, which were both switched to nonprescription status in 1985, will fuel growth in the cold and allergy markets in 1986.

Last year, according to the study, both products increased their market shares.

The increased popularity of cold relievers that contain ibuprofen is another factor that should help increase sales and spur growth in the otc industry.

Ibuprofen-based pain relievers are estimated to capture 15% of the pain-reliever market this year, up from 8% in 1985.

Marketing exclusivity of ibuprofen for American Home Products (Advil) and Bristol-Myers (Nuprin) ends in September, opening the way for other otc manufacturers to take advantage of this growing market.

Johnson & Johnson already has announced the launch of an ibuprofen-based product, and Upjohn, which is not bound by the market exclusivity, and American Home Products both launched new ibuprofen-based products earlier this month.

The complete survey is available from Charles H. Kline & Co., 330 Passaic Avenue, Fairfield, N.J. 07006-2099. #

Cigar market shares

Small cigars led the industry's continuing unit sales decline last year with a category loss of 16%. Large cigars fell 7.7% and little cigars dropped 1.2%. Market share for the three categories was generally unchanged. John H. Swisher & Sons clung to its No. 1 spot in the large and small category while losing .3% in share, and Dutch Treats recorded the only share increase in the little cigar category. Large and small cigars are combined in this table for industry reporting purposes. Source: John C. Maxwell.

Brand	1983		1984		1985	
	Units	%	Units	%	Units	%
Large and small cigars						
John H. Swisher & Sons						
King Edward	750	21.0	740	21.6	650	20.9
Others	150	4.2	160	4.7	160	5.1
Total	900	25.2	900	26.3	810	26.0

Consolidated Cigar						
Muriel	300	8.4	286	8.4	270	8.7
Dutch Masters	280	7.8	256	7.5	232	7.5
El Producto	175	4.9	158	4.6	137	4.4
Backwoods	43	1.2	41	1.2	38	1.2
Others	95	2.7	86	2.5	75	2.4
Total	893	25.0	829	24.2	752	24.2

General Cigar						
White Owl	195	5.5	176	5.1	165	5.3
Robert Burns	135	3.8	119	3.5	115	3.7
Tijuana Smalls	65	1.8	58	1.7	53	1.7
William Penn	125	3.5	101	2.9	82	2.6
Garcia y Vega	100	2.8	110	3.2	118	3.8
Others	50	1.4	47	1.4	40	1.3
Total	670	18.8	611	17.8	573	18.4

American Cigar						
Roi-Tan	64	1.8	50	1.5	38	1.2
Antonio y Cleopatra	164	4.6	148	4.3	138	4.4
La Corona	25	0.7	35	1.0	40	1.3
Casa Silva	—	—	11	0.3	4	0.1
Others	2	0.1	1	—	5	0.2
Total	255	7.1	245	7.1	225	7.2

Havatampa						
Havatampa	176	4.9	186	5.4	191	6.1
Phillies	174	4.9	166	4.7	160	5.1
Total	350	9.8	352	10.3	351	11.3

Lorillard						
Erik Filter Natural	67	1.9	62	1.8	58	1.9
Erik Filter Menthol	32	0.9	30	0.9	29	0.9
Erik Filter Cherry	19	0.5	18	0.5	17	0.6
Total	118	3.3	110	3.2	104	3.4

U.S. Tobacco						
House of Windsor	73	2.0	73	2.1	73	2.3

M&N Cigar Mfrs.						
Cuesta-Ray	22	0.6	23	0.7	23	0.7
Rigoletto	35	1.0	36	1.1	35	1.1
Total	57	1.6	59	1.7	58	1.9

Universal Cigar						
Optimo	62	1.7	60	1.8	57	1.8

Corral Wodiska y Co.						
Others	33	0.9	34	1.0	33	1.1

Others	156	4.4	154	4.5	74	2.4
Grand total	3,567	100.0	3,427	100.0	3,110	100.0

Little cigars

Reynolds	654.0	48.8	575.0	46.4	502.0	41.0
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Winchester	654.0	48.8	575.0	46.4	502.0	41.0
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Consolidated Cigar	515.0	38.4	556.0	44.8	565.0	46.1
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Dutch Treats	515.0	38.4	556.0	44.8	565.0	46.1
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Lorillard	13.1	1.0	11.3	0.9	10.5	0.9
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Omega Natural 85s	35.1	2.6	34.1	2.8	33.3	2.7
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Omega Natural 100s	4.4	0.3	4.0	0.3	3.3	0.3
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Cherry 100s	3.4	0.3	3.1	0.3	2.9	0.2
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Menthol 100s	56.0	4.2	52.5	4.2	50.0	4.1
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Total Omega	56.0	4.2	52.5	4.2	50.0	4.1
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Between the Acts (90mm)	39.9	3.0	37.9	3.1	36.0	2.9
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Madison (80mm)	26.1	1.9	24.4	2.0	22.5	1.8
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Total	122.0	9.1	114.8	9.3	108.5	8.9
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American Cigar						
Roi-Tan	10.0	0.7	7.0	0.6	4.0	0.3

(85mm, 100mm-F)	18.0	1.3	10.0	0.8	6.0	0.5
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Antonio y Cleopatra (100mm-F)	28.0	2.1	17.0	1.4	10.0	0.8
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Total	22.0	1.6	(22.8)	(1.8)	39.5	3.2
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Change in inventory	1,341	100.0	1,240	100.0	1,225	100.0
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Mark One Advertising adds regional office in Atlanta

ATLANTA—Mark One Advertising, Daytona Beach, Fla., has opened an office here to serve its regional retail clients. The branch office is called Hancock Advertising, after Mark One's president, Mark Hancock, who will oversee operations in both offices. The new agency is at 200 Galleria Pkwy., 30339. #

Special Report

Radio

Christy Ellis

Tuning in strong marketing signals

By Janice Steinberg

Radio stations are fighting harder than ever to stay on top of intensely competitive markets. As the going gets tough, the tough in every market are fine tuning formats, seeking new personalities and promoting community events. They also are turning to state-of-the-art marketing: Geodemographic and psychographic research are radio's newest, shiniest weapons.

"Psychographic research is the wave of the future. It's interesting, it's insightful, it will make managers think," says Robert R. Davis, manager-corporate research for Midwest Communications, Minneapolis, owner of WCCO (am), Minneapolis.

Janice Steinberg is a free-lance writer and former radio station promotion director.

Arbitron's geodemographic Target Aid, which pairs each Zip code in a market with one of 47 cluster groups, such as "average educated, married couples, children, homeowners," has 220 station subscribers. Access to the information costs

Data on the dial

- In 1985, radio stations spent \$88.9 million in six media including \$62.4 million for spot tv and \$25.4 million for outdoor advertising

Source: Broadcast Advertisers Reports, Institute of Outdoor Advertising and Outdoor Advertising Association of America as reported to Leading National Advertisers, New York.

- Total 1985 U.S. radio ad revenues of \$6.56 billion were up from 1984 ad revenues of \$5.88 billion.

Source: Radio Advertising Bureau, New York

\$320. Each request for specific information is priced based on complexity and size.

"Stations are doing much more sophisticated breakdowns and it's influencing the way they build promotions," says Danny Flamberg, senior vp-communications at the Radio Advertising Bureau, New York. "They are crafting their promotions to appeal to the life styles, the attitudes, the language of the people who are listening."

"Radio's got to be bigger than life," says Cindy Spodek, director-marketing at KIOI (fm), San Francisco. "You've got to be warm and cuddly and loved by your audience, but you've also got to have that incredible ability to pull off what nobody else can do."

Last summer, KIOI conducted a promotion in conjunction with Safeway Food Stores, Oakland, Cal., in which 101 people won trips to Disney-

(Continued on Page S-2)

Tuning in strong marketing signals

(Continued from Page S-1)

land. The seven-week promotion, called Celebration Vacation Sweepstakes, cost the station about \$50,000 for tv spots and entry blanks.

Safeway paid more than \$150,000 for tv, newspaper and spots on other radio stations—which mentioned the sweep-

tion will run again this summer.

The station also has done some imaginative low-cost promotions. A transplanted New Yorker, Ms. Spodek put on a New York "reunion" as a KIOI promotion in April, 1985, flying in Sabrett's hot dogs, cases of Yoo-Hoo beverage and Rheingold beer to a San Francisco bar. Although KIOI promoted the party only on the air—New York Mayor Ed Koch cut a promo—more than 800 people showed up.

"Word of mouth was phenomenal," Ms. Spodek says. "A listener called directory assistance and the operator noticed her heavy New York accent and asked if she was going to the KIOI party."

The station held a Chicago reunion in June, 1985, featuring Gino's pizza, White Castle hamburgers and an autographed Cubs baseball.

Total cost of both parties was \$3,000. American Airlines flew in the food in trade for promotional considerations.

Also in the "bigger than life" category, this spring WNEW (fm), New York, gave away eight Porsches. At a total cost of \$229,000 for the cars, director of advertising and promotion Rose Polidoro says she got a deal.

"It had the most incredible word of mouth buzz, it expanded the demographic in terms of hit-

ting the hot button for a lifestyle prize, and it was on the air for three months," she says. Latest Arbitron ratings for spring, 1986, show WNEW went from a 3.7 rating to 3.9.

"Here was this promotion that awarded eight wonderful lifestyle desirable prizes—incredible word of mouth—and it cost

ager of New York-based Interep Marketing Systems, which represents more than 1,000 stations.

"People are spending their money smarter," she says. "If they're going to use television, stations are taking a hard look. Can they really afford to buy television properly? They're looking at ways to dominate particular outside advertising vehicles, rather than doing a little of

ten. David Spence, general manager of KVIL (am, fm), Dallas, credits the "Incredible Prize Catalog" with a three-point ratings gain. In addition to the prize catalog, Unidyne offers several other contests, including "The Check's in the Mail."

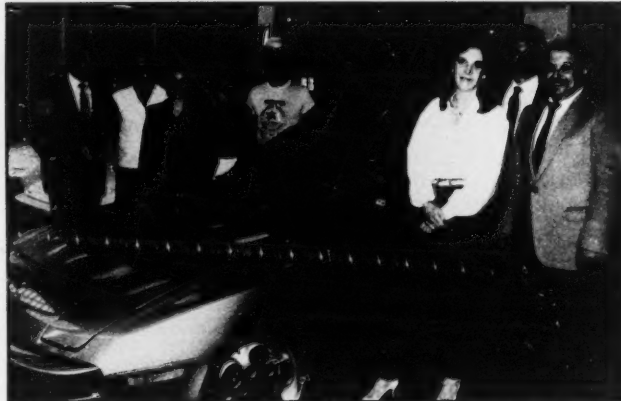
Similarly, adult contemporary WLVE (fm), Miami, sent a direct mail piece to more than 80,000 businesses, knowing that secretaries usually open the mail and turn on an office radio.

"With radio today you can't just run some tv spots or run some print ads or run a billboard."

Lee Pocock
KSL (am), Salt Lake City

stakes but did not name KIOI—and received more than \$200,000 in KIOI spot time. Safeway also featured KIOI in extensive point-of-sale advertising in area stores.

KIOI's ratings went from 3.3 in Arbitron spring, 1985, ratings for 12-plus listeners to 4.0 for the contest period, and Ms. Spodek says the Disneyland promo-



WNEW (fm) personality Dave Herman (in hat) shared smiles with six winners of Porsches and Bob Horowitz of Porsche Place (far left) after a three-month promotion at the New York station.

me one-fourth of what [a full-blown media campaign] would have cost. If I had put together a television schedule to compete with this, it would have been a phenomenal cost."

Although WNEW preferred Porsches, tv remains radio's most popular advertising medium. According to Broadcast Advertisers Reports, New York, stations ran \$62.4 million of spot tv in 1985, representing 70% of all radio station advertising. The 1985 spending is up from \$33.8 million in 1980.

Actual expenditures for tv may have gone up even more. Although the BAR figures include traded time, Danny Flamberg says stations are increasing buying rather than trading for tv time.

"Part of the increase in tv buys versus trades is the appreciation of the value of television as a reach medium for blanketing a market," Mr. Flamberg says. "Part is the greater availability of syndicated television commercials, which reduce the productive costs and give you higher production values than were ever available before." (See related story on Page S-4.)

Tv spots bring stations important residual benefits in markets influenced by ad agencies. Local media buyers, for example, may be sold by well-placed and well-produced tv spots, Mr. Flamberg says.

"You want women 18 to 34, so, like every other station in America, you try to get a local avail in 'Dynasty.' That's not targeting, that's a shotgun. But all the media buyers in town know you've bought it and you're getting incredible play and they're saying, 'Hey! KXRC is hot, they've got this new commercial, they've got this new image.' The value of that is so much greater than the number of eyeballs watching 'Dynasty.'"

Despite tv's benefits, stations are weighing the cost more carefully than ever, according to Erica Farber, vp-general man-

everything."

Outdoor is big, too. In Los Angeles, KNX (am) spends almost equal amounts on outdoor and tv. "Outdoor is a logical point-of-purchase medium for radio," says KNX director-advertising and promotion Fred Bergendorff. "People are in their cars, and they're only a fingertip away from the pushbuttons."

He says that by using a combination of outdoor and tv, the station's message is reinforced.

Los Angeles' KIIS-FM uses outdoor almost exclusively. Vp-station manager Lynn Anderson-Powell was unwilling to discuss whether KIIS is planning something new to win listeners from rival KPWR-FM. (See related story on Page S-6.)

In addition to traditional uses of tv and outdoor, radio marketers have discovered direct mail. Unidyne, a San Diego-based radio station promotional service, has done more than 200 direct mail campaigns in 115 markets in the past five years, according to Ernie Kovacs, sales manager.

When Unidyne's "Incredible Prize Catalog" arrives at every home in a station's market, promising a range of expensive goodies if listeners call within 15 minutes of hearing their entry number on WXYZ, people lis-

Another aspect of promotion many stations consider indispensable is community events. "With radio today you can't just run some tv spots or run some print ads or run a billboard. You just aren't going to get the attention," says Lee Pocock, director-promotion and creative services at KSL (am), the No. 1 station in Salt Lake City. "I believe you've constantly got to be out there, doing something."

Among KSL's 80 events a year are a radiothon that raised \$120,000 for a children's hospital.

"Community involvement is probably the most important promotion any radio station can do. The bottom line is maintaining visibility in the community that we would like to have as our listening audience," says Jon Quick, director-marketing and promotions at WCCO. One of the station's most successful events is the Twin Cities Marathon. WCCO puts its call letters on the start and finish banners and t-shirts and also covers the race live from its mobile van.

"Being a vital part of the community is one of the things that has really helped our numbers grow," says Jim Marchyshyn, director-marketing and promotion at St. Louis' No. 2 station, KSHE (fm). KSHE does an annual "Coats for Kids" campaign and "the biggest blood drive in Missouri," he says.

Mr. Marchyshyn voiced an issue expressed at some of top stations around the country. Despite the industry's excitement about psychographics, "Research is good to a point, but you still have to know your market and go with a gut feeling," he says.

Midwest Communications' Mr. Davis has a lot of respect for gut feelings. "The best thing I can do as a researcher is to give managers enough information so that their gut is a little more finely honed."

Does the D.J. in Pittstown, USA tell your dealers how to advertise your product on the air?

ONLY EVERY DAY.

Your dealers let their local radio stations be their guide when they want to buy retail air time. Often, a station's D.J. sells the air time, tapes some canned music and does the voice-over from a form script that's altered to "fit" your dealers' needs. It's all designed to sell your product at the retail level — you hope!

Pontiac, Wrangler, Subaru, FTD, Toyota, Amoco, Cadillac, Suzuki, Honda, Kawasaki, GM Parts, VW and other major manufacturers don't just hope. They count on us to deliver **THEIR MESSAGE** — not some D.J.'s — to radio stations and their dealers in one neat package.

We're the KWIKEE® RADIO BROADCAST SYSTEM (KRBS)™. And we can deliver YOUR MESSAGE, too.

Our base package includes: a soundsheet with up to eight minutes of sound for your music beds, jingles, pre-produced spots and/or donuts; three printed pages for your approved scripts, co-op information or whatever suits your needs; an identifying tab and distribution to our 4,500 subscribing stations. Those stations place your materials in the KRBS binder that we provide for them. Or you may choose distribution to 7,500 stations, or a mailing to match stations in your dealers' areas. Optional creative services are also available.

Remember, your dealers are not in the radio advertising business.

They need your help to air YOUR MESSAGE.

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KWIKEE® RADIO BROADCAST SYSTEM

A DIVISION OF MULTI-AD SERVICES, INC.

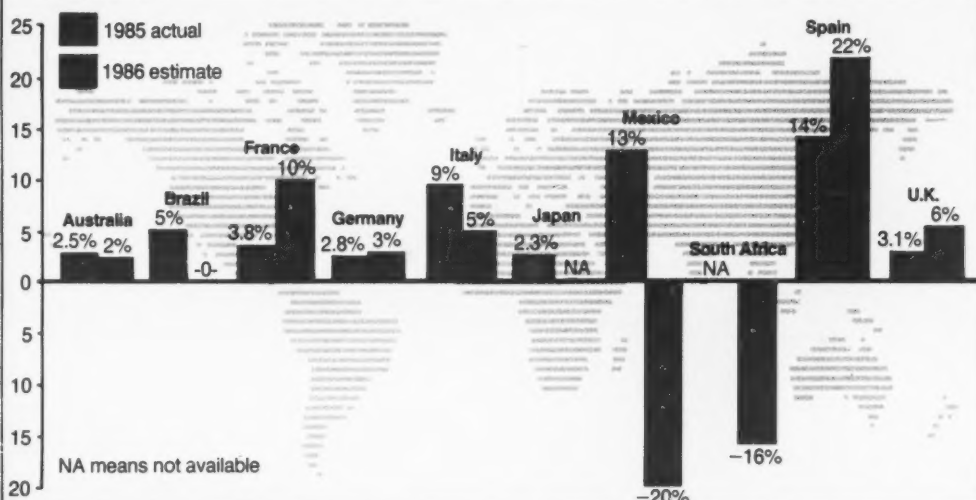
Top 15 radio stations by ad spending

Company	Radio station, city	Thousands spent
1. Viacom International	WLTW (fm), New York	\$1,674.1
2. Tribune Co.	WPIX (fm), New York	1,527.3
3. RCA Corp.	WYNY (fm), New York	1,380.5
4. Metromedia	WNEW (fm), New York	1,304.4
5. Bonneville International	WCLR (fm), Chicago	1,137.4
6. Westinghouse Electric Co.	WBZ (am), Boston	1,136.3
7. Capital Cities/ABC	WKHX (fm), Atlanta	1,013.8
8. Westinghouse Electric Co.	WINS (am), New York	929.3
9. Midwest Television	WCCO (am), Minneapolis	915.2
10. Westinghouse Electric Co.	KFWB (am), Los Angeles	910.9
11. Gencorp	KHJ (am), Los Angeles	879.1
12. King Broadcasting	KING (fm), Seattle	867.8
13. Capital Cities/ABC	KGO (am/fm), San Francisco	847.8
14. Susquahanna Broadcasting	WARM (am), Scranton, Pa.	832.1
15. Hobby-Cat	KPRC (am), Houston	831.5

Source: Broadcast Advertisers Reports as reported to Leading National Advertisers

Worldwide ad spending growth

A survey of advertising industry experts around the world indicates that 1986 ad spending in most of Europe will be higher than initially anticipated, but lower in South Africa and parts of Latin America. Inflation has been factored out and currency devaluations are not included. Source: Advertising Age.



Private tv sparks jump in European ad budgets

An Advertising Age roundup

Foreign advertising expenditures are soaring higher than anyone predicted at the beginning of the year, due to new private tv channels in Europe.

At the same time, surging inflation is sending the ad industries in Latin America and South Africa into a tailspin, but not enough to offset advances in Europe.

Those forecasts emerged from ADVERTISING AGE's latest twice-a-year survey of ad industry executives worldwide.

The survey supports predictions by Robert Coen, senior vp-director of forecasting, McCann-Erickson, New York, who recently said ad spending outside the U.S. will be up 26.7% over 1985, compared to a 7.6% increase in the U.S. (AA, June 30).

Mr. Coen's figures were converted into dollars, and consequently are more bullish than Ad Age's, which are expressed in the local currency. "I would not be surprised if my figures were revised upward at the end of the year," he said. "I've factored in a conservative exchange rate."

The revised 1986 Ad Age forecast shows real (i.e., with inflation factored out) growth in the U.K., France, Spain and Germany nearly twice as high as anyone expected earlier this year. Forecasts for Brazil, Mexico and Italy have been revised downward. Australia and Japan remain unchanged.

EUROPE

The growing number of private tv channels is the single most important factor boosting 1986 advertising expenditure figures in Europe.

"With additional tv time in major markets like France, Italy, Belgium and Denmark, that's a hell of a lot of time," said Bill Tragos, TBWA's ceo.

TBWA, with 75% of its billings overseas, expects a double-digit increase this year over last, based in dollars, he said.

In Spain, softer oil prices, a weaker dollar and Spain's entry into the European Economic Community in January have led Spanish admen to speculate that ad expenditures will be up 22% by the end of the year—considerably higher than the previous 13% forecast made in February.

Ad spending in Spain grew 17% in real terms during the first six months of 1986 compared with the same period last year. Political ads for a recent election and for the NATO referendum "will make up 3% to 4% of the over-all increase," said Julian Bravo, director general, J. Walter Thompson S.A.

In France, predictions climbed from a 4% increase expected in February to 10%. The French Advertising Agency Assn. attributed the upswing to the growth of private tv channels after the ousting of the Socialist majority in March.

"The function creates the organ, or the more media we have, the more advertisers will buy the space," said Jacques Bordelais, president of Bordelais, Lemeunier & Leo Burnett.

In the U.K., estimates of ad-spending growth for the year doubled, from 3% predicted in February to 6% now. Expenditures in the first half of '86 climbed 9%, compared to a depressed 1985 first half.

However, the British Advertising Assn. predicted a second-half slowing.

"Real incomes have been going up by around 6% in the country so far this year," said Mike Waterson, AA research director. "So consumers have had a lot more money to spend. At the same time, profits have been improving."

Germany expects a modest 3%-to-5% increase, despite a zero inflation rate. A 1% increase was previously predicted.

Italy was the only European country surveyed where growth predictions fell—from 8% to 5%.

Angelo Usai, president of McCann-Erickson Italiana, said, "I would say at midyear that we can expect growth in spending, though not the kind we saw during the boom," after Italy ended government ownership of tv and allowed ads in 1978.

"During the boom, there were years when real ad spending increased by 50%," said Vittorio Maglia, secretary-general of ASSAP, the Italian agency association. "But now we are a mature market."

LATIN AMERICA AND SOUTH AFRICA

Mexico's forecasts, like its economy, have taken a nosedive. Previously, agency executives anticipated a 13% increase over 1985 expenditures. Now, after months of a troubled economy and an 80% inflation rate, a 20% drop is expected.

Jaime Martinez, general director of Paulino Romero y Asociados, said the World Cup soccer tournament, held in Mexico in June, boosted ad expenditures, but not enough to push Mexico to last year's spending levels.

In Brazil, where the government introduced an anti-inflation plan in February, estimates were also revised downward, from 5% growth in February to no change from last year. After the inflation-fighting plan was enforced, ad spending came to a sudden halt. Media buying experienced a slow comeback in June because of declining media prices.

The price freeze boosted consumer spending, creating shortages of certain products such as cars, home appliances and tobacco. Marketers of the hard-to-find products have stopped advertising.

South Africa's political troubles are playing havoc with its economy and the ad industry. The country's forecast is the worst of the survey, with an estimated drop of 16% compared to last year.

JAPAN AND AUSTRALIA

In Japan, Dentsu, its largest agency, makes official predictions for the total Japanese industry once a year. Earlier this year, it estimated expenditures would increase by 4% in 1986, but the figure has not been updated and sources say it is now unrealistic.

Sources cite Dentsu's first-half performance; the agency said its real growth for January through June dropped 1%. "We are just praying that things will look up before the end of the year," said a Dentsu staffer.

"In Japan, the economy has been having some problems. It hasn't hit us yet, but we are anticipating it," said Jerry Roberts, ceo of DYR Inc.

Though ad restrictions for banks and financial (Continued on Page 45)

Alfa Romeo shifts gears

By CLAIRE WILSON

PARIS—Italian auto maker Alfa Romeo is giving its \$15 million-to-\$20 million European account to SSC&B:Lintas and local agencies in Italy, Spain and the U.K.

At the same time, the car marketer is changing its creative thrust to capture more of Europe's upscale automobile market.

The big loser in the agency switch is D'Arcy Masius Benton & Bowles, which relinquished the Alfa account six months ago. During the review, Alfa used existing DMB&B ads. DMB&B formerly handled the account in Austria, Belgium, France, Germany, Netherlands, Spain and Switzerland.

The account goes to Lintas in Austria, Belgium, France, Germany, Netherlands, Sweden and Switzerland.

In the U.K., the account goes to the Basel-based GGK network. Lintas has the Toyota account in the U.K.

The Italian budget represents about half of the European account, according to Claudio Masi, president of Milan-based MAC. His agency shares Alfa's Italian billings with Cremona, Italia/BBDO and ODG. Each Italian agency handles a different model, with Alfa Romeo controlling media planning and purchases.

CBC, in which DMB&B has a

10% stake, had the account in Italy for the last 15 years. Lintas has the Mercedes-Benz account in Italy.

Mr. Masi said dividing the account among four agencies in Italy is an experiment to "see who gets the best results and then pare it down to eventually two agencies."

In Spain, where Lintas has the account for Renault (which has a 33% market share), Alfa Romeo goes to Madrid shop NCA.

The old DMB&B strategy for Alfa Romeo involved corporate ads that showed the car maker's logo and revealed nothing about the performance of the car.

The new strategy, created by Lintas' Paris office and translated into different European languages, will break in October and will focus on Alfa's "sporting heritage," according to a Lintas source.

Alfa Romeo officials could not be reached for comment. The troubled Italian car maker, which manufactures only about 180,000 cars annually, has about a 1% market share in France, and even less in most markets, except Italy.

The company, owned and subsidized by the Italian government, is also talking with Ford Motor Co. about selling some Alfa units.

Alfa Romeo is interested in selling assets to Ford to solve Alfa's cash-flow problems, while Ford wants Alfa to develop special products for the U.S. #

Saatchi accord saves account

By DAGMAR MUSSEY and JULIE SKUR HILL

Ted Bates Worldwide and Saatchi & Saatchi last month narrowly saved about \$40 million worth of business from German clients concerned about client conflicts arising from Saatchi's impending buyout of Bates.

Bates and Hamburg-based Scholz & Friends, 51% owned by Bates, took the unusual step of issuing "confidentiality agreements" to BMW, and possibly other clients, to assure that no information would be passed between Scholz and Saatchi.

The main conflict is between the Jaguar account, handled by Saatchi & Saatchi in the U.K., and Scholz' \$22 million BMW account in Germany.

BMW, which traditionally uses smaller agencies, threatened to bolt Scholz & Friends, one of the hottest breakaway agencies in Europe, if the agency didn't maintain its

independence from Saatchi.

When the auto marketer initially expressed its conflict concerns, agency co-founders Juergen Scholz and Michael Menzel attempted to buy themselves out of an 8-month-old agreement with Bates—either by buying 100% of the agency or 2%, giving them a majority (AA, July 7).

But the Bates-Scholz contract did not provide for a buyback, and Bates turned down the offer.

BMW then pushed the Hamburg agency for written confirmation that no BMW information be available to the Saatchi agencies.

Saatchi also handles a small account from coffee marketer Jacobs-Suchard in Germany, while Scholz handles Tchibo coffee. In addition, Saatchi handles Gallaher's Silk Cut cigarettes in the U.K., while Scholz handles Reemtsma cigarettes in Germany.

The Tchibo and Reemtsma accounts are worth about \$10 million each. #

World News Roundup

(Continued from Page 3)

Ayer is not repitching.

VEVEY, SWITZERLAND—Nestle S.A. agreed to standardize nutritional information on packages worldwide to meet United Nations' codes.

BUENOS AIRES—Parker Pen chose Y&R de Argentina for its \$800,000 account. Ortiz Scopesi/Ogilvy & Mather previously handled.

PARIS—General Foods Corp. moved its \$750,000 Tang account from Grey to Ogilvy & Mather.

LONDON—PepsiCo picked Ogilvy & Mather for its media planning and buying for pan-European satellite tv channels, a new account. Saatchi & Saatchi, BBDO and J. Walter Thompson also pitched.

MEDIA PEOPLE

'Life' boosts 4 in ad sales shifts

NEW YORK—Life has named four advertising sales executives to new posts in a restructuring of its ad sales department.

Named sales division managers, in charge of three new regional sales divisions, are Sy Sarnoff and James Sammartino, co-eastern division managers; Robert Daley, midwestern division manager, and George Eckardt, western division manager.

Mr. Sarnoff was a sales rep. Mr. Sammartino was a senior sales rep. Mr. Daley was Detroit advertising manager and Mr. Eckardt was West Coast manager.

Other people moving:

Raymond Cyrgalis to display advertising director, a new post at the *Daily News*, New York, from retail advertising manager.

Dan O'Day to national ad manager, *Chicago Sun-Times*, from national ad sales manager. He succeeds **Scott Ring**, who earlier was named vp-advertising, and is replaced by **Bob Campbell**, formerly division manager-financial/media/publishing. Also at the *Sun-Times*, **Joe Sherman** to retail ad manager from division manager, replacing **Paul Skittone**, earlier named vp-display advertising; **Joe Muranski** to retail ad sales manager from sales manager-dining/entertainment; **Norm Rosinski** to classified ad manager from retail sales manager, and **Chuck Agresti** to classified ad sales manager from associate manager-eastern region.

John Karns to Detroit branch manager, *Successful Farming*, Des Moines, from publication manager of SF's market development unit. Also, **Jeff Freil** to director of research from manager of financial services for parent Meredith Corp.'s magazine group.

Caroline Lippert to account manager, *Architectural Digest*, New York, from sales exec, *Metropolitan Home*. She succeeds **Scott Westerberg**, now account manager, *U.S. News & World Report*.

Jeanne Trkla to account manager, Webb Co.'s custom publishing division, St. Paul, Minn., from circulation manager.

Ernest Rensulli to advertising director, a new post, *Golf Illustrated*, New York, from advertising director, *Home Mechanix*, where he was succeeded by **John Young** (AA, March 13).

Gary Berkley to general manager, a new post at the *Belleville* (Ill.) *News-Democrat*, from vp-marketing. Also, **Frank Duke** to marketing director at the daily from circulation director.

Shirley Geoghanian to publisher, *Fancy Food & Candy*, Des Plaines, Ill., from associate publisher. She succeeds **Daniel von Rabenau**, who continues as president of parent Talcott Communications Corp.

Claire Gruppo to vp-development and acquisitions, a new post, American Express

Publishing Corp., New York, from director-development and acquisitions.

Sharon McKee to director-creative services, *Mademoiselle*, New York, from head of her own copy/consulting business, succeeding **Marlene Rathgeb**, who left.

Gerd Hinske to European director, Management Focus Group, McGraw-Hill Publications Co., Lucerne, Switzerland, while remaining publisher, *International Management*.

Jim Connell to vp-publishing, a new post at Wayne Green Enterprises, Peterborough, N.H., from chairman-ceo of seven companies for Argus Press Group, London.

Allan Johnson to vp-advertising, a new post at ABC Publishing Agricultural Group, Lombard, Ill., from national sales manager, ABC's *Farm Progress* Cos., Lombard. Succeeding Mr. Johnson is **Chuck Roth** from regional manager, *Farm Progress*.

BROADCASTING

Kenneth Tonning to vp-general man-

ager, KUSA-TV, Denver, from vp-station manager. He succeeds **Charles Leasure**, who was promoted to general executive, Gannett Television, Denver.

OTHER VIDEO

Ron Inman to vp-marketing director, Assn. of Independent TV Stations, New York, from general sales manager, WTOG-TV, Tampa-St. Petersburg, Fla. He succeeds **Richard Hogan**, who left.

Scott Trentadue to vp-director of sales and marketing, Goetz Broadcasting Corp., Fort Atkinson, Wis., from director of sales and marketing and sales manager for WFAW (am) and WSJY (fm). He is succeeded in the latter post by **Jim Vriesen**, formerly account exec. Also, **Virginia Berg** to sales manager, WDLB (am) and WLJY (fm), Marshfield, from account exec.

James Birschbach to vp-marketing, a new post with McGraw-Hill Broadcasting Co., New York, from national sales man-

ager, KGTU, San Diego.

Chad Hoffman to vp-dramatic series development, ABC Entertainment, Los Angeles, from executive producer, ABC motion pictures for tv. He succeeds **Jordan Kerner**, who left.

Deborah Curtan to vp-network tv current comedy, a new post at Lorimar-Telepictures, Culver City, Cal., from director-current comedy programs, NBC, Burbank. Also at Lorimar-Telepictures: **Ken Horton** to the new post of vp-network tv from director-current programs.

Joe Levinsohn to vp-international sales, Republic Pictures Corp., Los Angeles, from managing director-worldwide sales/marketing, ABC Sports, New York. He replaces **Arthur Gross**, who died.

Mary Silverman to director-programming, a new post at Lifetime, New York, from manager-acquisitions, USA Network. Also to new posts at Lifetime: **Pam Burke** to executive producer from producer; **Margaret Sandwick** to vp-public affairs from press relations, MTV Networks; **Erin McGrath** to director-advertising/promotion from manager-advertising; **Sara Burke** to supervisor-marketing from marketing coordinator-affiliate relations; **Julie**

Bauer and Joyce Gibney to marketing coordinators from, respectively, pr assistant and marketing assistant.

Rosalind Alcana to director-pr, a new post at Rainbow Programming Enterprises' Bravo subsidiary, Woodbury, N.Y., from director-programming services, Bravo and American Movie Classics. Also at Rainbow: **Cheryl Simon** to the new post of national sales director, Bravo, from western regional sales director.

Frank Hildebrand to vp-production, a new post at Empire Entertainment, Los Angeles, from independent producer, Samuel Goldwyn Co. #

Give your product away — on network tv game-shows.

It's the ultimate in low-cost, mass exposure. We provide a complete service to all network shows. Write for details.

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"Recently we used a television commercial to offer viewing households nationwide a free can of Diet Dr Pepper. All consumers had to do to take advantage of the offer was call a toll-free number.

"It was the single largest sampling effort in the history of the Dr Pepper

Company. We felt a campaign of this magnitude could only be handled by the largest telemarketing company in the country. WATS Marketing of America. Not only did WATS Marketing have the size and technical capability, but based on our past experience with them, we knew they could do the job.

"Strategic staffing and thorough pre-planning guaranteed we'd get the results we wanted. And we did. In fact, the promotion was so successful, we're considering doing it again."

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Omaha, Nebraska 68134
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Full Range of Outbound Services Available.

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Budgets

(Continued from Page 42)

institutions in Japan have been relaxed, the effort apparently did not go far enough to boost ad spending. Also, the strength of the yen has socked such major exporters as Honda, Toyota and Nissan, forcing them to slow the growth of their ad budgets.

In Australia, a previous prediction of 2% remains on target, but 1987 looks bleak because of the weak Australian dollar.

"The coming 12 months are going to be pretty tough—there are strong signs that the economy is slowing," said Malcolm Spry, group managing director of Monahan Dayman Adams. #

This story was written by Julie Skur Hill in Chicago from reports filed by Sean Milmo in London; Claire Wilson in Paris; Marina Specht in Madrid; Dagmar Mussey in Duesseldorf; Tony Shugaar in Milan; Julia Michaels in Sao Paulo; Stephen Downer in Mexico City; Des Kilalea in Johannesburg; Nobuko Hara in Tokyo and Geoffrey Lee Martin in Sydney.



An American Express company

Newspaper Advertising MRCS/SAU Inches

May 1986 vs. May 1985

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
AKRON, OH				
Beacon Journal (E)	105,559	---	111,497	---
Beacon Journal (S)	66,760	---	70,911	---
Grand Total	172,319	---	182,408	---

NOTE: Part-run figures not available.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
ALLEN TOWN, PA				
Call (M)	175,052	---	---	---
Call (S)	80,831	---	---	---
Grand Total	255,883	---	---	---

NOTE: Part-run figures and 1985 figures not available.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
ATLANTA, GA				
Constitution (M)	193,218	73,382	207,352	55,234
Journal (E)	193,095	70,413	207,309	56,448
Journal & Constitution (S)	136,941	58,615	128,388	61,933
Journal & Constitution (Sat)	53,808	---	43,579	---
Grand Total	576,973	202,410	580,188	173,615

NOTE: Constitution Morning and Journal Evening published five days a week only.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
BALTIMORE, MD				
News American (S)	29,132	9,490	39,116	10,754
News American (E)	28,556	4,688	43,064	7,681
Sun (M)	135,661	1,112	134,954	---
Sun (E)	99,704	1,008	110,096	---
Sun (S)	141,183	42,501	144,803	31,150
Grand Total	428,236	58,699	472,033	49,585

NOTE: News American Sunday and Evening ceased publication May 27, 1986.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
BERGEN COUNTY, NJ				
Record (E)	173,370	24,477	178,537	35,188
Record (S)	137,764	44,311	141,433	30,587
Grand Total	311,134	68,788	319,970	65,775

NOTE: Record Evening published five days a week only.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
BOSTON, MA				
Herald (M)	88,949	---	51,054	---
Herald (S)	17,846	36,763	16,780	31,673
Globe (M)	158,786	14,450	151,516	9,784
Globe (S)	171,691	14,252	168,085	29,434
Grand Total	425,272	85,520	387,035	72,901

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
BUFFALO, NY				
News (AD)	128,494	21,603	121,945	19,831
News (S)	72,560	19,520	65,169	19,993
Grand Total	200,954	41,123	187,113	39,824

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
CAMDEN, NJ				
Courier Post (E)	198,153	74,309	126,025	19,845
Courier Post (S)	59,370	8,909	55,127	1,449
Grand Total	257,523	83,218	181,152	21,294

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
CHARLOTTE, NC				
News (E)	---	---	80,736	518
Observer (M)	158,849	16,829	136,523	24,658
Observer (S)	76,496	40,646	68,616	34,645
Observer (Sat)	215,344	19,475	205,885	59,821

NOTE: News Evening ceased publication November 7, 1985. Part-run figures not available.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
CHICAGO, IL				
Sun Times (M)	147,815	91,383	141,209	81,717
Sun Times (S)	64,058	27,882	107,944	40,044
Tribune (M)	131,046	263,358	150,299	221,276
Tribune (S)	118,919	113,920	118,899	98,887
Grand Total	461,838	496,543	418,351	341,924

NOTE: Tribune figures supplied by publisher to Media Records. 1986 figures represent advertising for 4/28/86 to 5/25/86. Tribune All Day changed to Morning publication effective August 14, 1985.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
CINCINNATI, OH				
Enquirer (M)	182,323	6,133	183,261	6,205
Enquirer (S)	132,743	12,594	111,249	9,382
Post (S)	83,193	20,286	88,586	22,935
Grand Total	398,259	39,013	383,096	38,522

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
CLEVELAND, OH				
Plain Dealer (M)	160,968	46,627	157,001	38,623
Plain Dealer (S)	109,902	8,610	105,875	7,484
Grand Total	270,870	55,237	262,876	46,107

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
DALLAS, TX				
News (M)	321,084	10,822	332,694	16,319
News (S)	169,496	19,757	176,994	11,889
Times Herald (AD)	243,326	31,323	291,829	25,951
Times Herald (S)	121,411	27,426	132,204	10,575
Grand Total	855,317	80,328	933,621	66,734

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
DENVER, CO				
Rocky Mt. News (M)	297,830	1,098	370,830	1,783
Rocky Mt. News (S)	98,076	800	91,279	2,749
Post (M)	203,160	8,031	218,836	6,410
Post (S)	125,383	---	119,230	3,163
Grand Total	724,449	9,929	790,125	14,105

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
DETROIT, MI				
Free Press (M)	110,757	45,868	100,886	48,613
Free Press (S)	46,391	24,701	45,844	24,543
News (AD)	175,971	50,999	162,856	46,561
News (S)	90,851	38,157	79,981	34,716
Grand Total	423,970	169,725	389,567	153,893

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
ESCONDIDO, CA				
Times Advocate (E)	100,444	526	---	---
Times Advocate (S)	47,909	---	---	---
Grand Total	148,353	526	---	---

NOTE: 1985 figures not available.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
FORT LAUDERDALE, FL				
News & Sun Sentinel (S)	100,395	---	116,944	---
Sun Sentinel (M)	296,183	---	300,168	---
Grand Total	396,578	---	417,132	---

NOTE: Part-run figures not available. Morning figures include the Saturday Edition.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
FORT WAYNE, IN				
Journal Gazette (M)	81,101	---	83,309	---
Journal Gazette (S)	69,385	---	60,173	---
News Sentinel (E)	89,652	---	96,105	---
Grand Total	240,138	---	239,587	---

NOTE: Part-run figures not available.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
GREENWICH STAMFORD, CT				
Time (E)	90,401	1,065	87,516	83
Time (S)	62,670	---	52,295	---
Advocate (E)	112,452	20,414	106,592	809
Advocate (S)	61,445	---	53,713	---
Grand Total	326,968	21,479	297,516	892

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
HARTFORD, CT				
Courant (M)	164,360	40,481	157,377	34,496
Courant (S)	84,478	191,590	86,530	113,233
Grand Total	248,838	232,071	243,907	147,729

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
HONOLULU, HI				
Advertiser (M)	130,080	---	128,687	---
Star Bulletin (S)	120,840	---	120,840	---
Star Bulletin (E)	---	---	---	---
Advertiser (S)	---	---	---	---
Grand Total	250,920	---	249,527	---

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
HOUSTON, TX				
Chronicle (AD)	248,738	21,755	245,362	20,903
Chronicle (S)	114,881	37,451	108,032	28,903
Post (M)	196,736	29,782	193,032	44,712
Post (S)	224,021	129,487	228,076	162,874
Grand Total	684,376	189,475	674,502	237,592

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
LONG BEACH, CA				
Press Telegram (M)	111,403	48,180	107,643	---
Press Telegram (S)	57,229	---	54,139	---
Grand Total	174,836	48,180	161,782	---

NOTE: 1985 Part-run figures not available.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
LONG ISLAND, NY				
Newsday (E)	169,136	119,084	207,047	71,584
Newsday (S)	132,719	96,741	132,903	84,605
Grand Total	301,855	215,825	340,050	156,189

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
LOS ANGELES, CA				
Times (M)	329,028	255,878	336,561	325,897
Times (S)	162,213	94,823	167,539	96,330
Newsday (M)	61,252	7,947	73,891	14,043
Newsday (S)	16,404	9,389	16,164	5,157
Grand Total	568,903	368,037	594,055	431,427

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
LOS ANGELES-SAN FERNANDO VALLEY, CA				
News (M)	216,737	34,473	228,618	35,840
News (S)	88,551	717	78,130	1,584
Grand Total	305,288	35,190	306,748	37,424

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
*LOS ANGELES-TORRANCE, CA				
Breeze (E & S)	154,591	---	218,712	---
Grand Total	154,591	---	218,712	---

NOTE: Figures supplied by publisher to Media Records.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
*LOUISVILLE, KY				
Courier Journal (M)	105,141	60,927	106,762	49,330
Courier Journal (S)	61,530	67,708	58,659	66,566
Times (E)	101,909	67,915	105,193	68,403
Grand Total	268,580	196,550	270,614	184,299

NOTE: Figures supplied by publisher to Media Records.

	1986		1985	
	Full Run	Part Run	Full Run	Part Run
*MEMPHIS, TN				
Commercial Appeal (M)	145,375	116,388	140,868	119,147
Commercial Appeal (S)	97,402	6,415	87,520	11,010
Grand Total	242,777	122,804	228,388	130,157

NOTE: Figures supplied by publisher to Media Records.

MIAMI, FL				
Herald (M)	166,638	-----	182,766	-----
Herald (S)	83,452	-----	91,438	-----
News (E)	62,576	-----	67,940	-----
Grand Total	312,666	-----	342,144	-----